

**Maximizing Human Resources:
Training Library Automation Trainers**

**Amigos Fellowship Final Report
August 1998**

Submitted by

**Keitha Ramsey and Cherie Colbert
University of Houston Libraries**

Maximizing Human Resources: Training Library Automation Trainers

Amigos Fellowship Final Report

This statement is respectfully submitted to the Amigos Bibliographic Council, Inc., by Cherie Colbert and by Keitha Ramsey Robinson to meet the requirements of the Amigos Fellowship. This report includes the following components: A. Summary of Activities, B. Financial Report, and C. Evaluation.

A. Summary of Activities

1. *Background*

The idea for our proposal to the Amigos Bibliographic Council for the Amigos Fellowship came about in the following way. We noticed that library automation skills were an increasingly necessary and integral part of the contemporary library profession; and that this emphasis on library automation skills was evident across the traditional lines of library technical services and public services functions.

We noticed that there was a lack of information on the topic of library automation training and that the Amigos Fellowship might support research that would ultimately help improve training in Amigos member libraries.

2. *Purpose*

We proposed that it would be useful to our profession to conduct a descriptive research project. We would prepare and distribute a survey to gather information to describe what training practices were in place in a subset of libraries, including details such as who performed library automation training, how often training took place, and how it was evaluated.

For our survey subset, we choose the Amigos member libraries for the following reasons; because we were in an Amigos member library and thus had some direct experience with the Amigos organization;; because we had observed that surveys from Amigos were completed in our library setting rather than ignored; because Amigos member libraries had a mix of public, academic, and technical libraries; and because Amigos member libraries were members because of library automation services.

3. *Preparation*

To prepare for our research project, we conducted a review of the relevant literature in the field of library science, and a review of the relevant literature in the field of training for business management.

A key part of our project was the emphasis on dialogue with actual professionals in the field. We scheduled meetings with training professionals from Amigos Bibliographic Council, Inc., who trained both technical services and public services library staff. And we scheduled meetings with library professionals, both public services and technical services, at Texas Christian University.

This dialogue would be a crucial factor in shaping our survey. We felt it important that our survey be the result of more than our personal observations of our fellow University of Houston colleagues, or of the published literature. We felt it important to have face to face input about the immediate concerns of professionals working in the field. These discussions would also shape our training handbook.

We choose TCU, in part, because of its location which was near the Amigos headquarters, so that we could combine our travel arrangements. TCU also had a reputation for state-of-the-art library automation, including its online catalog, and its reference database services.

4. *Tasks*

We set about creating a calendar. This calendar was interrupted in part by the unexpected 5-week hospitalization of one of the primary researchers. As the saying goes, "life is what happens when one is making other plans."

We revised our calendar. We scheduled meetings with Amigos and with TCU for November, 1992. We flew from Houston, Texas, to Dallas, Texas on November 11, 1992. We returned to Houston, Texas on November 13, 1992. We spent a day at TCU and then a day at Amigos.

5. *Design*

We created a 12-page, 45-question survey. The survey was designed to gather general descriptive information about each responding member library. The survey was designed to be answered by both public services and by technical services. The survey was designed to repeat the questions to each area, so that we could compare and contrast training activities in these two library areas.

6. *Outcomes*

We mailed the survey to the library directors via a mailing list from Amigos. We asked for a reply by a particular date. Keitha handled telephone calls from participants who called to inquire about how best to complete the survey. We sent out a "reminder" request to those libraries that did not respond to the first round of mailing.

7. *Analysis*

We consulted with the University of Houston Measurement & Evaluation Center for a statistical analysis of the survey results. The results had to be manually coded into the software program from each survey.

8. *Dissemination of Survey Results*

As soon as we obtained the statistical analysis, we created a one-page, two-sided “brief summary” that was mailed to all Amigos member libraries.

We felt strongly that it was important to send the libraries the results of the survey, even in abridged form, since so many times we fill out surveys and then never hear from the researcher again. Also, the goal of this descriptive research project was always to have practical applications such as the improvement of training in Amigos member libraries, and dissemination of information is key to that.

We distributed copies of the complete 45-page statistical analysis to Amigos Bibliographic Council, Inc., to Texas Christian University, to our respective supervisors, and to the library administration of our sponsoring library.

C. Evaluation

The Amigos Fellowship supported our professional development in several ways.

1. As librarians, working daily in the practice of the profession, we rarely have the opportunity to conduct research. The fellowship made this possible. This was a learning experience in how a project goes from idea to implementation to analysis that we are very grateful to have experienced.
2. This project taught us a lot about the process of proposal writing for library project as well as about the research and grants funding process within the academic setting. It is very different to actually be involved in proposal writing and the academic committee on human subjects approval process, than to just read about it or attend a seminar on it.
3. As librarians from different divisions of the traditional library, one of us from public services and one of us from technical services, this project taught was invaluable in teaching us about the workings of library technology that we might not have learned otherwise. It is ironic, we thought we would be pointing out to the survey participants how similar the applications of library technology are across the typical library functions and we were the ones to gain such a better understanding of the two areas.
4. This project supported our professional growth in that it gave us the opportunity to interact with professionals at various levels and with various purposes. We got to hear firsthand the point of view of the Amigos training professionals. We met with librarians from TCU. We worked with the measurement and evaluation center at the University of Houston. This “dialogue” was one of the most fulfilling parts of the project. It helped us to gain the perspective of the “big picture” when looking at the daily needs of today’s library.

Project Goals

1. We are pleased to report that the response to the survey was over 71% of those contacted. We owe personal thanks to each library staff member who spent their time completing the survey, making our analysis of their answers possible. The research project would not have been possible without the support of these generous colleagues across the southwest.
2. We feel that the survey yielded some useful data that might be of assistance to our Amigos member libraries, and we are obliged that it might have some practical benefit.
3. We are delighted to give permission to Amigos to disseminate the information from the survey over the Web site, as discussed with Ms. Wilt (attached to this report).
4. We are pleased to have helped in any way with the ongoing dialogue between library professionals about training, and feel that can only benefit our profession and those we serve.
5. This project has taught us a lot about the unexpected things that can happen in life that can affect one's plans and schedules. In particular, we have the text of the "Training Manual" into which we have invested our time and resources but which we have not yet completed. We are eager to see that part of the project completed as the Board may be.

Automation Training Practices:

A Survey of AMIGOS Member Libraries

Keitha Ramsey and Cherie Colbert

Pre-Publication Highlights, November 1, 1993

Introduction

» With an award from the 1992 AMIGOS Fellowship Program, we conducted a survey to gather descriptive data about automation training practices of AMIGOS member libraries, in particular, comparing activities in cataloging departments with those of reference departments.

Participants

57%

» 57% Response

On May 18, 1993, we mailed questionnaires to AMIGOS member libraries. 201 of the 350 organizations responded by August 1, 1993, representing 57% of the total number of member libraries.



» Type Of Library

Of the 201 organizations that responded, 30% categorized themselves as university libraries, 18% described themselves as public libraries, 11% identified themselves as community college libraries.

Cataloging vs. Reference Training Activities



» The Trainers

Question 10: "Who has the major responsibility for staff training related to automated cataloging?"
Responses: librarian from the cataloging department--63%; paraprofessional staff from cataloging department--20%; librarian from another department--8%.

Question 29: "Who has the major responsibility for staff training related to automated reference?"
Responses: librarian from the reference department--62%; paraprofessional staff from reference department--5%; librarian from another department--12%.

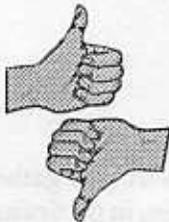
It appears that librarians from within the cataloging or reference departments most often perform automation training for their respective departments. Cataloging paraprofessionals appear more active as trainers than their reference counterparts. Librarians from other departments more often train in reference than in cataloging departments.

» Written Guidelines

Questions 14 & 33: "Are there written training policies, procedures or guidelines for this trainer to use?" Responses: 30% of the cataloging departments replied yes; 22% of the reference departments replied yes.

It appears that a large percentage of both cataloging and reference departments lack written training policies, procedures or guidelines for library automation training.

» Evaluations



Questions 22 & 41: "Does the trainer distribute evaluation forms to be completed by the participants?" Responses: 92% of the cataloging departments replied yes; 12% of reference departments replied yes.

Questions 23 & 42: "Who reads the evaluations?" Responses: cataloging trainers--5%, cataloging supervisors 2%; reference trainers--11%, reference supervisors--3%.

It appears that a larger percentage of cataloging trainers distribute evaluation forms to be completed by the participants. However, a larger percentage of reference trainers than cataloging trainers appear to read the completed evaluations.

» Follow-Up Sessions

Questions 24a & 43a: "Does the trainer offer refresher or follow-up sessions?" Responses: 61% of cataloging departments replied yes; 64% of reference departments replied yes. Questions 24b & 43b: "Type of sessions?" Responses: Informal, day-to-day: cataloging--63%; reference--60%.

It appears that follow-up training occurs for a majority of the respondents and that it most often occurs in an informal, day to day basis for both cataloging and reference.

» Vendor Training



Questions 26 & 45: "Attendance at vendor-sponsored automation training?" Responses: cataloging departments--63% AMIGOS training, 13% in integrated system training; reference departments--46% AMIGOS training, 26% CD-ROM training.

It appears that both cataloging and reference departments send staff to vendor training sponsored by AMIGOS more often than the other training options.

Note: We will submit a research article for publication in a scholarly journal that presents an in-depth analysis of the results of this survey.